



Press release

London, 3 December 2021

Rothschild & Co wins inaugural Client Relationship Award at Spear's Wealth Management Awards 2021

Rothschild & Co is delighted to announce that it has won the Client Relationship Award at the Spear's Wealth Management Awards 2021. Charles Costa Duarte, who co-heads a client team in the UK, was also shortlisted as UHNW (ultra-high-net-worth) Wealth Manager of the Year.

The Client Relationship Award, in its inaugural year, recognises the firm or team which has demonstrated an outstanding ability to provide a truly excellent bespoke service to UHNW clients.

James Morrell, Managing Director, Rothschild & Co's UK Wealth Management business said: *"Our clients expect the best and we seek to exceed their expectations. We have very consciously sought to ensure a culture which puts clients and exceptional service at its centre. The Spear's judging panel are real experts in the private client universe, so their independent recognition of how our service levels set us apart is particularly important. Another way we can judge successful client service is positive feedback from clients themselves. We have enjoyed record levels of referrals from clients in recent years, which is a huge compliment."*

The judges commended Rothschild & Co's Wealth Management team for successfully embedding a culture of exceptional client service throughout the business, being innovative and striving to always see things from a client's perspective. The panel noted the firm's inclusion of client service objectives in every individual's performance review, the establishment of the Exceptional Client Service Committee and 'adopt-a-client' initiatives, enabling colleagues to build client relationship strategies together, resulting in impressive retention and referral rates.

Spear's is a highly regarded wealth management and luxury lifestyle media brand, whose flagship magazine is targeted at UHNW individuals and the financial services community. Its annual Wealth Management awards, which recognise the best wealth managers, lawyers, property advisers, accountants, family office service providers and private banks servicing wealthy clients, were launched more than ten years ago and attracted a record number of entries this year.

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About Rothschild & Co, Wealth Management

Rothschild & Co is family-controlled and independent and has been at the centre of the world's financial markets for over 200 years. With a team of c.3 600 talented financial services specialists on the ground in over 40 countries, Rothschild & Co's integrated global network of trusted professionals provide in-depth market intelligence and effective long-term solutions for our clients in Global Advisory, Wealth & Asset Management, and Merchant Banking.

Rothschild & Co's Wealth Management business provides investment management services to a wide range of families, entrepreneurs, charities and foundations. The Rothschilds are one of the few families to have successfully preserved their wealth over seven generations, so we understand the issues wealth owners must address. We believe preservation first is the right approach to managing wealth and our distinct, long-term perspective sets us apart, making us a secure home for their assets. Wealth & Asset Management offices are in Aix-en-Provence, Birmingham, Bordeaux, Brussels, Dusseldorf, Frankfurt, Geneva, Grenoble, Guernsey, London, Manchester, Madrid, Marseille, Milan, Monaco, New York, Paris, Toulouse and Zurich. Wealth & Asset Management assets total more than €95 billion across the group.